

TEACHERS' RETIREMENT BOARD
BENEFITS AND SERVICES COMMITTEE

SUBJECT: SERVICE LEVELS DURING
DATABASE CONVERSION

ITEM NUMBER: 5

ATTACHMENT(S): 1

ACTION: X

DATE OF MEETING: February 8, 2001

INFORMATION: _____

PRESENTER(S): Lynda Bridges/
Michael Carter

Attached are the projected service levels for the delivery of CalSTRS benefits and services during START implementation.

During the first half of Fiscal Year 2000/01 staff maintained consistently high service levels to its members. Even with a significant number of staff redirected to START activities, service levels were maintained primarily due to increased productivity, repriorization of work, overtime and the continued processing of applications in the legacy system (IDMS)

The Board has already been apprised on the "Downtime" period (one month) preceding the March 15, 2001 birth of START. During this downtime period, the data will be converted and reconciled. In addition, one to two weeks prior to downtime, the legacy system must be frozen. Accordingly, for approximately 24 business days, staff will be unable to process information online (on the database). The IDMS system will be available for inquiry only.

The following charts show that backlogs will be created by staff's inability to process information online. The backlogs vary by program and are influenced by case volume, case information required and other variables. Although case processing backlogs will exist, due to the detailed planning of START and production staff, all essential services will be maintained at exceptional levels, particularly under the expected circumstances.

Further discussion will occur at the Board meeting to explain service level impacts, planned staff activities during downtime and strategies to eliminate the expected backlogs.

CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM
Production Objective Goals
for START Implementation

Attachment I
Benefits Services - Item 5
February 8, 2001

| | IDMS System Shutdown | DOWNTIME - One Month | PROJECTED TARGET DATES TO REACH PRODUCTION OBJECTIVES | | | | | | | | | |
|---|----------------------|---|---|--------|--------|--------|--------|--------|--------|--------|--------|--|
| | 10-Feb | 16-Feb | 16-Mar | 19-Mar | 31-Mar | 15-Apr | 30-Apr | 15-May | 30-May | 14-Jun | 29-Jun | |
| SERVICE RETIREMENTS | | | | | | | | | | | | |
| Process Service Retirement Application payments within 30 days of Retirement Effective Date or Receipt of completed application (Initial Payment) | | 24 Business days - NO PROCESSING - Online information available to identify that member application was received by CalSTRS | | 10% | 25% | 50% | 75% | 100% | | | | |
| Complete final service retirement payments within 45 days of receipt of all necessary information | | 24 Business days - NO PROCESSING - Online information available about member application | | 10% | 20% | 40% | 60% | 80% | 100% | | | |
| Finalize 90 percent of all service retirement payments within four months of the retirement effective date | | 24 Business days - NO PROCESSING - Online information available about member application | | 10% | 25% | 50% | 90% | | | | | |
| SURVIVOR BENEFITS | | | | | | | | | | | | |
| Process 95 percent of all Survivor Benefit applications within 30 days of receipt of all necessary | | 25 Business days - NO PROCESSING - Online information available about SB application | | 10% | | | | 30% | | 50% | > | |
| Complete 95 percent of all death benefit payments for retired members within 90 days of receipt of notification of death | | 24 Business days - NO PROCESSING - Online information available about case | | 10% | | | | 30% | | 50% | > | |
| DISABILITY SERVICES | | | | | | | | | | | | |
| Process 100 percent of all eligible applications within 180 days of receipt | | 24 Business days - NO PROCESSING - Online information available about application | | 25% | 50% | 75% | 100% | | | | | |
| Process 95 percent of all approvals within 30 days of receipt of all necessary information | | 24 Business days - NO PROCESSING - Online information available about case | | 25% | 50% | 75% | 95% | | | | | |
| Process 100 percent of all initial payments within ten working days following the latter of the disability approval date, disability effective date or receipt of all necessary information | | 24 Business days - NO PROCESSING - Online information available about case | | 25% | 50% | 75% | 100% | | | | | |

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| PUBLIC SERVICE | | | | | | | | | | | | | |
| Answer 95 percent of all calls in less than three minutes | | 19 Business days - MINIMAL IMPACT - Information about member available but will be frozen as of February 16th | MINIMAL IMPACT - Member Information available but not current until backlog is eliminated | | | | | | | | | | |
| Process 95 percent of all calls on the first contact. | | 19 Business days - MINIMAL IMPACT - Information about member available but will be frozen as of February 16th | MINIMAL IMPACT - Member Information available but not current until backlog is eliminated | | | | | | | | | | |
| Respond to 90 percent of all correspondence in ten working days | | 19 Business days - MINIMAL IMPACT - Information about member available but will be frozen as of February 16th | MINIMAL IMPACT - Member Information available but not current until backlog is eliminated | | | | | | | | | | |
| REGIONAL COUNSELING SERVICES | | | | | | | | | | | | | |
| Conduct 400 workshops | | NO IMPACT | NO IMPACT | | | | | | | | | | |
| Provide 22,000 retirement interviews | | 19 Business days - MINIMAL IMPACT - Information about member available but will be frozen as of February 16th | MINIMAL IMPACT - Member Information available but not current until backlog is eliminated | | | | | | | | | | |
| Deliver 41 Financial Education Programs to CalSTRS members | | NO IMPACT | NO IMPACT | | | | | | | | | | |